

Client name:

T.A. Session Business Assessment (Meetings 1 and 2)

BEFORE TA SESSION, fill out using SB supplemental application:

Business license? ☐ Yes ☐ No Business Checking/Capitalization Account? ☐ Yes ☐ No
Business plan? ☐ Yes ☐ No
Business status: ☐ Not yet in business ☐ Start Up (less than 12 months) ☐ Existing business (Intends to expand)
Business type:
Business description:

TA Meeting # 1:

Date:
Method: ☐ By phone ☐ In person

Intake Score:

(Mktg, Sales, Ops, Admin)

TA Meeting # 1 Score:

TA Meeting # 2 Score:

Business Update: .

TA Meeting # 2:

Date:
Method: ☐ By phone ☐ In person

Business license? ☐ Yes ☐ No

Business plan? ☐ Yes ☐ No

Additional notes:

Intended use for IDA savings:

Other notes:

Client homework:

TA Session 1

TA Session 2

<p><u>Marketing</u> TA 1 Score:</p> <p>Product/Pricing/Target Market/Competition</p>	<p><u>Marketing</u> TA 2 Score:</p> <p>Product/Pricing/Target Market/Competition</p>
<p><u>Sales</u> TA 1 Score:</p> <p>Selling Experience/Projections/Customer Demand</p>	<p><u>Sales</u> TA 2 Score:</p> <p>Selling Experience/Projections/Customer Demand</p>
<p><u>Operations</u> TA 1 Score:</p> <p>Product or Biz Experience/Biz Volume/Location</p>	<p><u>Operations</u> TA 2 Score:</p> <p>Product or Biz Experience/Biz Volume/Location</p>
<p><u>Administration</u> TA 1 Score:</p> <p>Biz Mgmt/Ownership/Bookkeeping/Permits or Licenses</p>	<p><u>Administration</u> TA 2 Score:</p> <p>Biz Mgmt/Ownership/Bookkeeping/Permits or Licenses</p>